



Ecosystem Enablement

Increase the value of Play to Android Developers

Jan, 2020



Authors: Ashraf Hassan

EXHIBIT 8519.R

HIGHLY CONFIDENTIAL - ATTORNEYS' EYES ONLY

GOOG-PLAY-000285821.R

EXHIBIT 8519.R-001

Agenda

- *The change in Developers' needs*
- *DSAT Results*
- *Solution [Ecosystem Enablement]*
- *Progress to date on Ecosystem Enablement Partners and expected close date*
- *Communications to dev Strategy and Workflows*
- *Next Steps*

AC PRIVILEGED /// REFLECTS LEGAL ADVICE

Executive Summary

- Developers' needs are changing and they outsource big part of their needs. The main 2 reasons of outsourcing are the lack of expertise on their teams and the lack of budget. They are also very interested in Google's recommendations on which 3rd party to outsource to
- Ecosystem Enablement is bridging the gap between devs' outsourcing needs and 1st and 3rd party solutions
- 3rd P providers are keen in working with us but they need to know more details about the target audience, but we are finalizing partnerships
- Some pilots are not feasible given the complexity of the 3rd P integrations and overhead on devs
- We are gaining traction and expected to have a good catalog to kick off pilots

AC PRIVILEGED /// REFLECTS LEGAL ADVICE

Background

AC PRIVILEGED /// REFLECTS LEGAL ADVICE

The Mobile App Ecosystem has changed

AC PRIVILEGED /// REFLECTS LEGAL ADVICE

The Mobile App Ecosystem Has Changed

Mobile Ecosystem Has Changed

Revenue Concentration

Most of Play revenue is driven by handful of developers

Evolving Developer Needs

Developers are more sophisticated and have expect more from us

Increasing Distribution Competition

- 3P platform stores (e.g., Amazon) and OEM stores
- Developers exploring 1P solutions (e.g., Epic)

Developer churn risk: Developers stop distributing (or distribute less) on Play

- Many developers evaluating other distribution options
- Current "App Store Tax" meme fueling discontent; undercuts value of Play

Google opportunity to diversify the number of successful developers and increase the value of Play to developers

- Apps and Games developers asking for solutions to help them accelerate growth and to help them with their outstanding business challenges

6

AC PRIVILEGED // REFLECTS LEGAL ADVICE

Developer churn from Play adversely impacts the ecosystem

Users

- Risks to security and privacy
- Arduous device management
- Friction navigating several catalogs
- Inconsistent and confusing UX

Developers

- Increased development complexity
- More app breakages, more SDKs and bloat
- Difficulty growing an Android app business

Implications for Google

- **Decrease in Play revenues** through lower volumes and price pressure
- More **attention to Android fragmentation** and **security concerns**
- **Lower adoption** of Google's developer services / APIs
- **New catalog gaps** over time
- Increase in **churn to iOS**

AC PRIVILEGED // REFLECTS LEGAL ADVICE

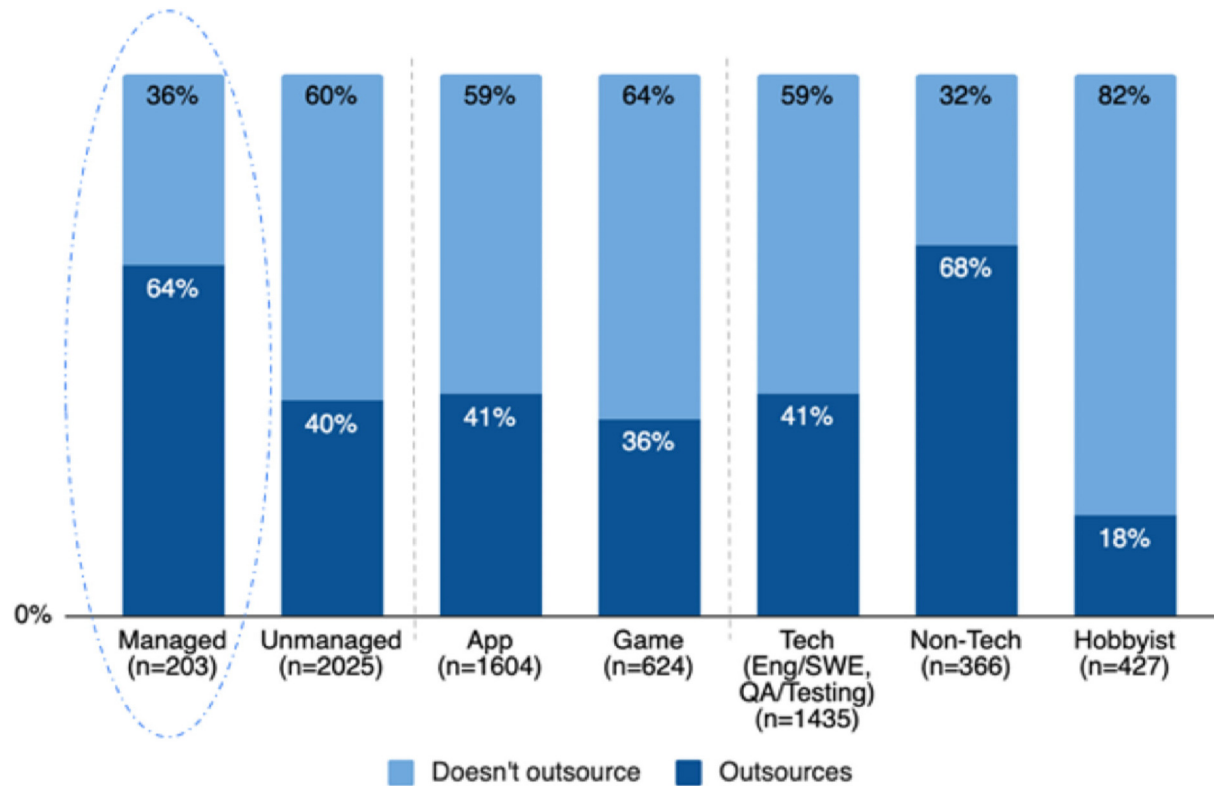
Developer churn risk has focused on impact to Play. But we're also concerned about impact to Android user experience (and Android churn risk)



So...what did developers tell us?

AC PRIVILEGED /// REFLECTS LEGAL ADVICE

Of the developers surveyed, **64%** of Managed developers report outsourcing

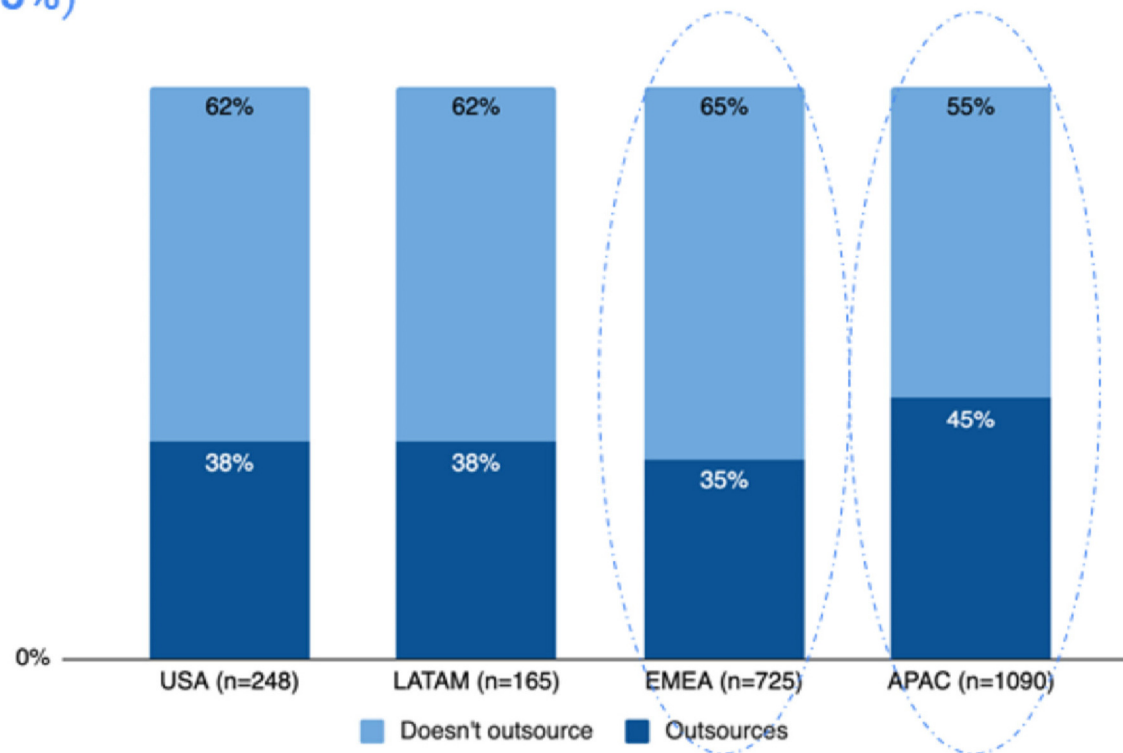


Many companies outsource different development related tasks. Which of these, if any at all, do you or does your company outsource as part of your development? (base: all developers)

AC PRIVILEGED // REFLECTS LEGAL ADVICE

10

Outsourcing has a higher incidence in **APAC (45%)**, while developers in **EMEA** least likely (**35%**)

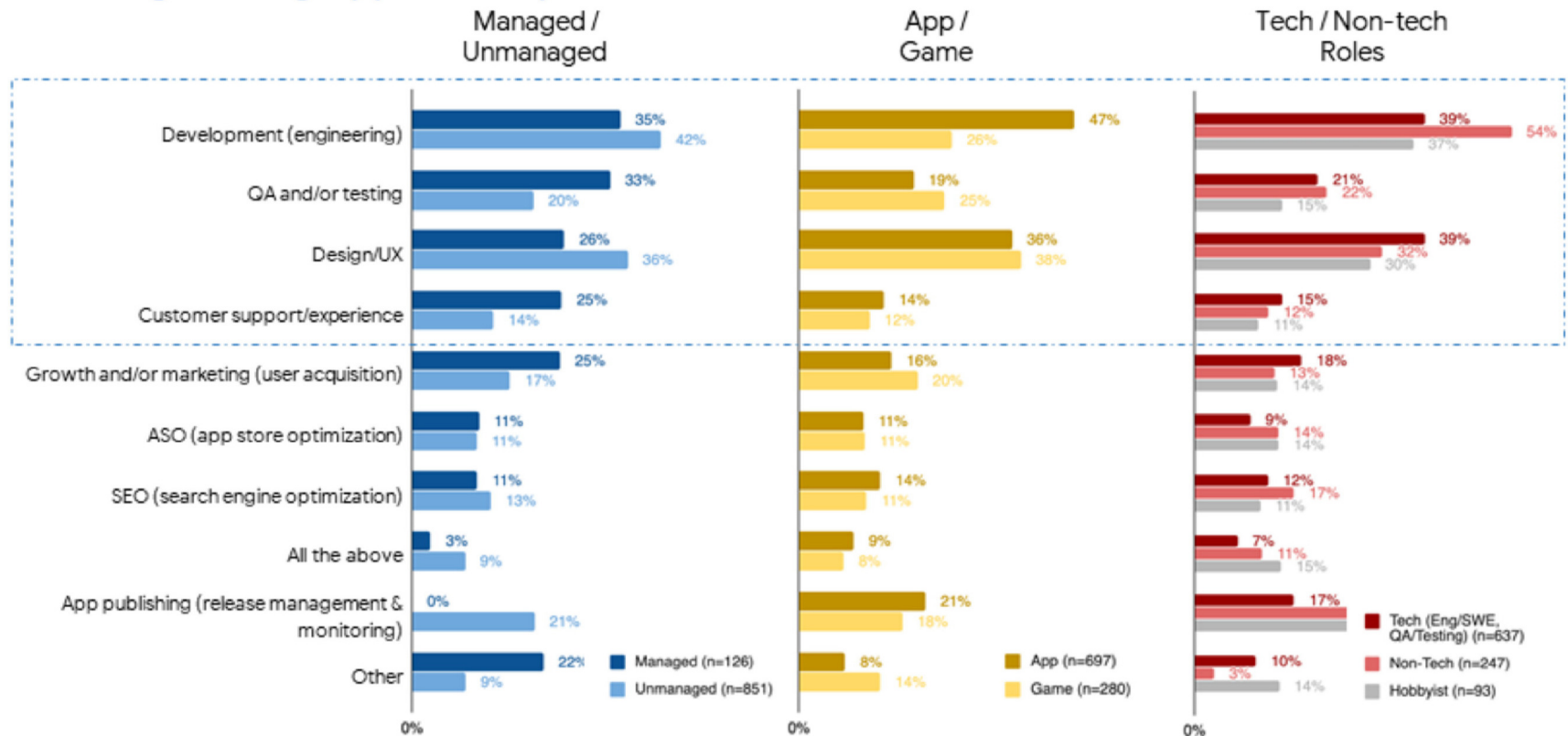


Many companies outsource different development related tasks. Which of these, if any at all, do you or does your company outsource as part of your development? (base: all developers)

AC PRIVILEGED // REFLECTS LEGAL ADVICE

11

Development, Testing, UX/Design and Customer Service show highest outsourcing among app developers



Many companies outsource different development related tasks. Which of these, if any at all, do you or does your company outsource as part of your development? (base: all developers)

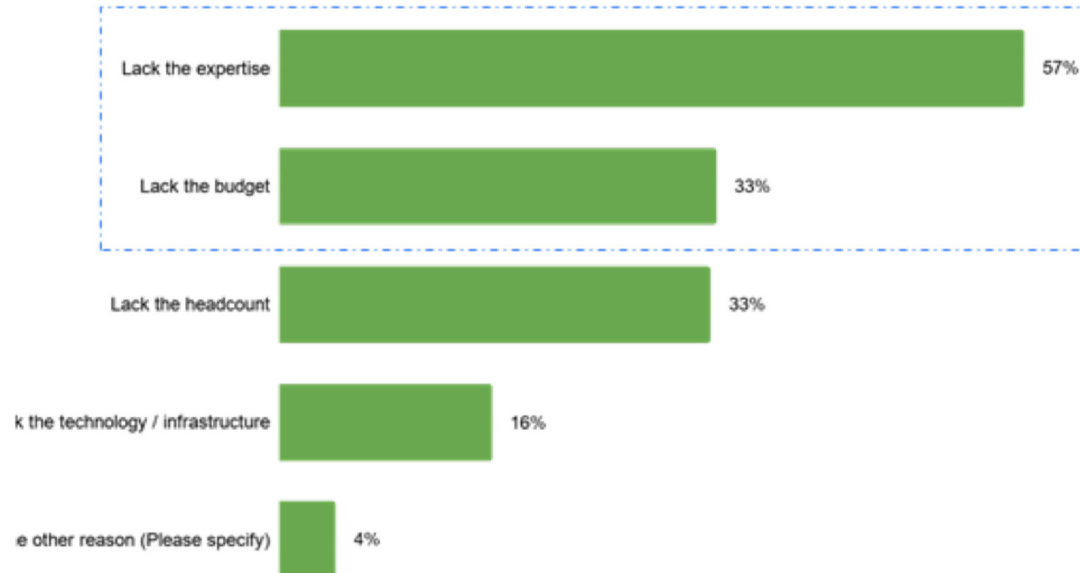
AC PRIVILEGED // REFLECTS LEGAL ADVICE

12

The primary reasons for outsourcing are either the **lack of expertise** in-house or **lack of Budget**

What are the reasons you did or do need to outsource? Select all that apply.

n=234 (Base: Those who outsource)

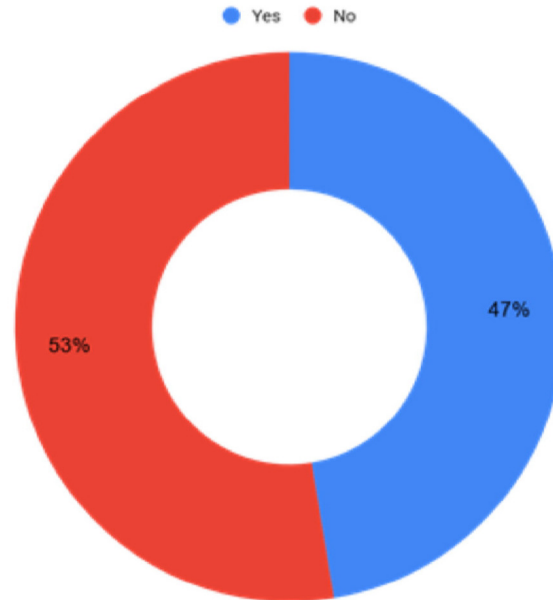


AC PRIVILEGED // REFLECTS LEGAL ADVICE

50% of developers know where to find 3rd party outsourcing resources and the other half don't

Have you found 3rd parties or partners that can support the needs you can't meet in-house?

n=234 (Asked of those who say they don't need to outsource services or tools)

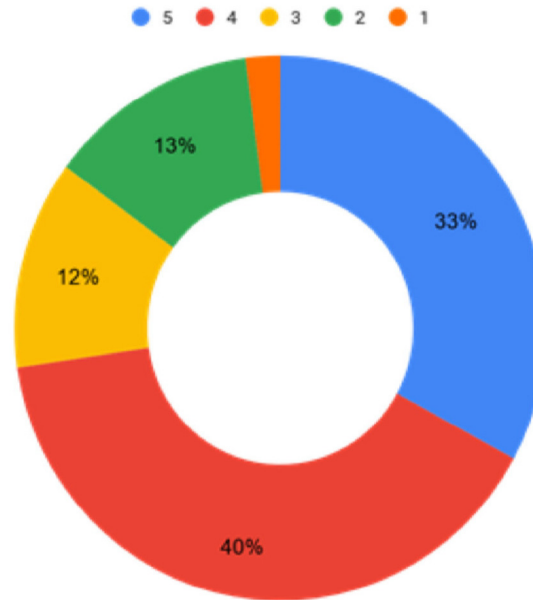


AC PRIVILEGED // REFLECTS LEGAL ADVICE

73% consider having a trusted resource that can refer potential partners to be valuable

Now imagine if you'd had a trusted resource to connect you to potential partners for the 'out of your core competencies' support. Would you find that...? (5= very valuable, 1= not at all valuable)

n=234 (Asked of those who say they don't need to outsource services or tools)



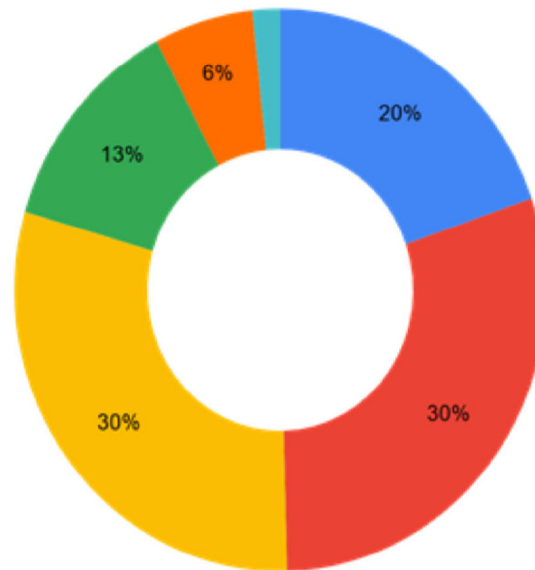
AC PRIVILEGED // REFLECTS LEGAL ADVICE

50% say they'd be extremely interested in connecting with out of their core competencies' service providers

How interested would you be in having a trusted resource connect you to potential partners for the 'out of your core competencies' support?

n=234 (Asked of those who say they don't need to outsource services or tools)

● Extremely interested ● Very interested ● Moderately interested ● Slightly interested ● Not at all interested ● Don't know or not sure



AC PRIVILEGED // REFLECTS LEGAL ADVICE

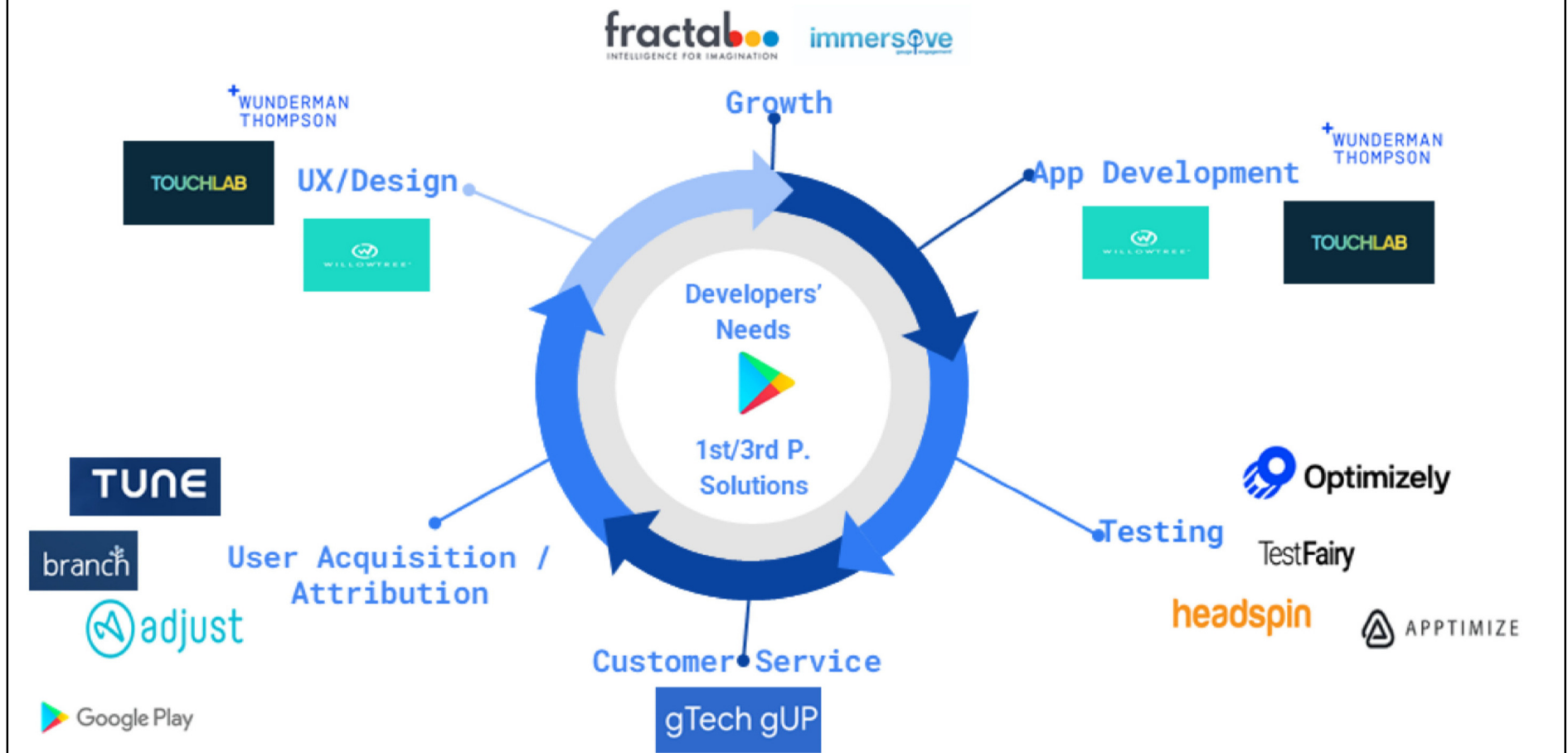
So what did we decide to do for our developers?

AC PRIVILEGED /// REFLECTS LEGAL ADVICE

Bring world-class 1st and 3rd party solutions at a subsidised pricing or higher service levels in the areas that developers need to help them accelerate growth.

AC PRIVILEGED /// REFLECTS LEGAL ADVICE

By mapping Developers Needs to 1st and 3rd P Solutions to help them grow



Development/Design

Development/
Design

Growth

Performance Testing

A/B Testing

Customer
Service

UA
(Attributions)

Developer Needs / Use Cases

Partner

Progress

Expected Close Date

[illegible]

AC PRIVILEGED // REFLECTS LEGAL ADVICE

Growth

Development/
Design

Growth

Performance
Testing

A/B Testing

Customer
ServiceUA
(Attributions)Developer Needs
/ Use Cases

Partner

Progress

Expected Close Date

Description	<ul style="list-style-type: none"> User Churn Prediction Tool Re-engagement Strategies Growth Hacking Behavioral Science 	<ul style="list-style-type: none"> Fractal immersyve 	<ul style="list-style-type: none"> Fractal has assigned a resource to shadow the GC team for 2 weeks to learn a more about what we do. The hope is that with a better understanding of our value prop, capabilities & the data availability, they will be better armed to put together a partnership proposal. Proposal negotiations Stage 	<ul style="list-style-type: none"> Start date for the resource is Feb 10th Pilot proposal March 2020 May 2020
-------------	--	--	--	--

AC PRIVILEGED // REFLECTS LEGAL ADVICE

Performance Testing

Development/
Design

Growth

Performance
Testing

A/B Testing

Customer
ServiceUA
(Attributions)Developer Needs
/ Use Cases

Partner

Progress

Expected Close Date

Description	<ul style="list-style-type: none"> • Global Expansion(GoGlobal) • Identify Bugs and Fixes • Faster app/feature Release 	<ul style="list-style-type: none"> • TestFairy • HeadSpin 	<ul style="list-style-type: none"> • Pilot in progress • Proposal negotiations 	<ul style="list-style-type: none"> • Agreements Accepted • March 2020
-------------	---	---	--	---

AC PRIVILEGED // REFLECTS LEGAL ADVICE

A/B Testing

Development/
Design

Growth

Performance
Testing

A/B Testing

Customer
ServiceUA
(Attributions)Developer Needs
/ Use Cases

Partner

Progress

Expected Close Date

Description	<ul style="list-style-type: none"> • Price Testing • Store to Install • Conversion Testing • Faster app/feature Release 	<ul style="list-style-type: none"> • Apptimize • Optimizely 	<ul style="list-style-type: none"> • Agreements created and waiting for signature • Still waiting on proposal 	<ul style="list-style-type: none"> • Feb 2020 • Feb 2020
-------------	---	---	---	--

AC PRIVILEGED // REFLECTS LEGAL ADVICE

Customer Service

Development/
Design

Growth

Performance
Testing

A/B Testing

Customer
ServiceUA
(Attributions)Developer Needs
/ Use Cases

Partner

Progress

Expected Close Date

Description	<ul style="list-style-type: none"> User Issues Troubleshooting Play Store Reviews optimizations Increase user satisfaction and faster SLA's 	<ul style="list-style-type: none"> Jarvis (Internal Project Name by the gUP Team) 	<ul style="list-style-type: none"> <u>6 months pilot completed</u> 	<ul style="list-style-type: none"> Ready to be used by top partners
-------------	--	---	---	---

AC PRIVILEGED // REFLECTS LEGAL ADVICE

UA (Attributions)

Development/
Design

Growth

Performance
Testing

A/B Testing

Customer
ServiceUA
(Attributions)Developer Needs
/ Use Cases

Partner

Progress

Expected Close Date

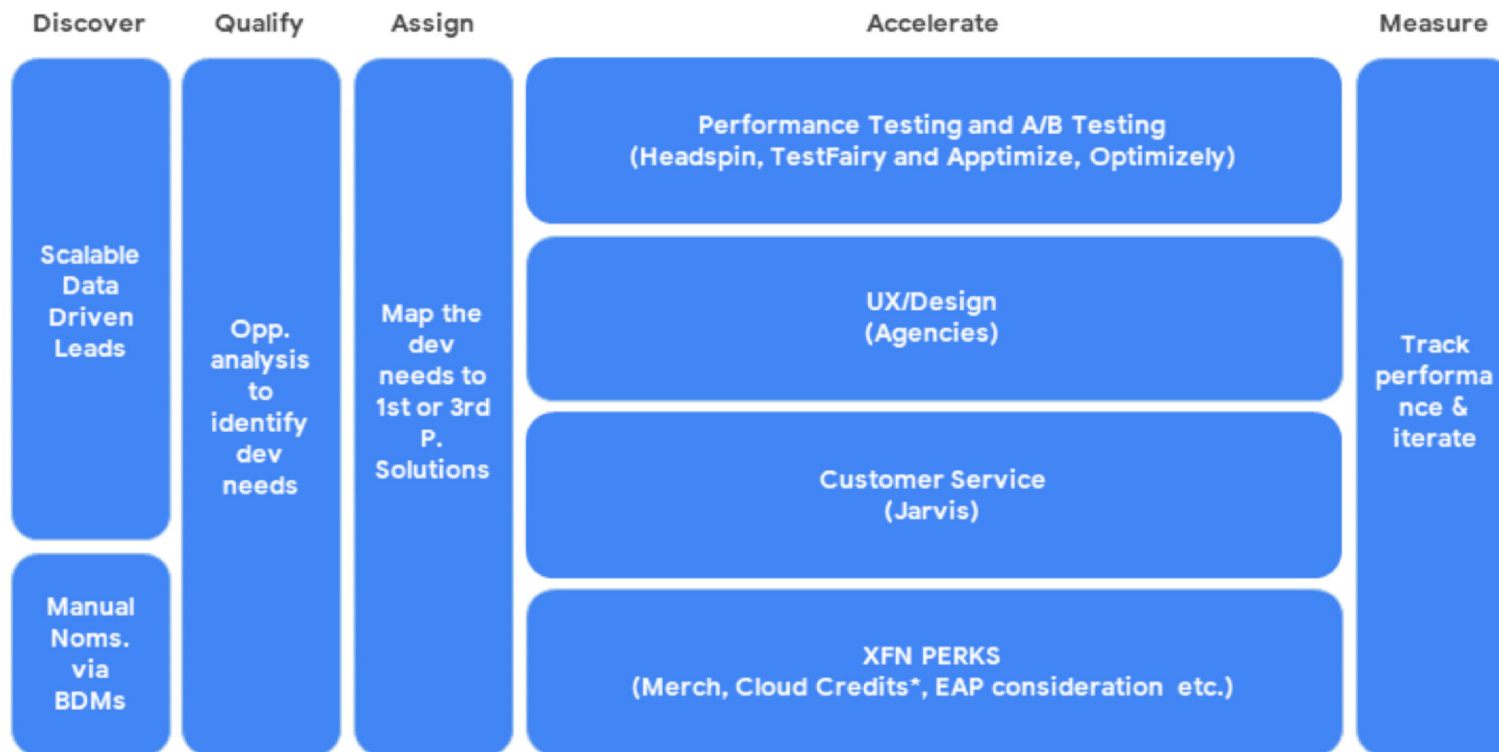
Description	<ul style="list-style-type: none"> • Non-organic user acquisition Measurement and Tracking • User Behaviour Tracking • Fraud Prevention 	<ul style="list-style-type: none"> • Kochava • Branch • AppsFlyer • Adjust 	<ul style="list-style-type: none"> • Proposal in-progress • Proposal in-progress • Proposal in-progress • Proposal Received and Agreement has been shared for signature 	<ul style="list-style-type: none"> • March 2020 • March 2020 • March 2020 • Feb 2020
-------------	--	--	---	--

AC PRIVILEGED // REFLECTS LEGAL ADVICE

What's the Communication Strategy to Devs and Workflows?

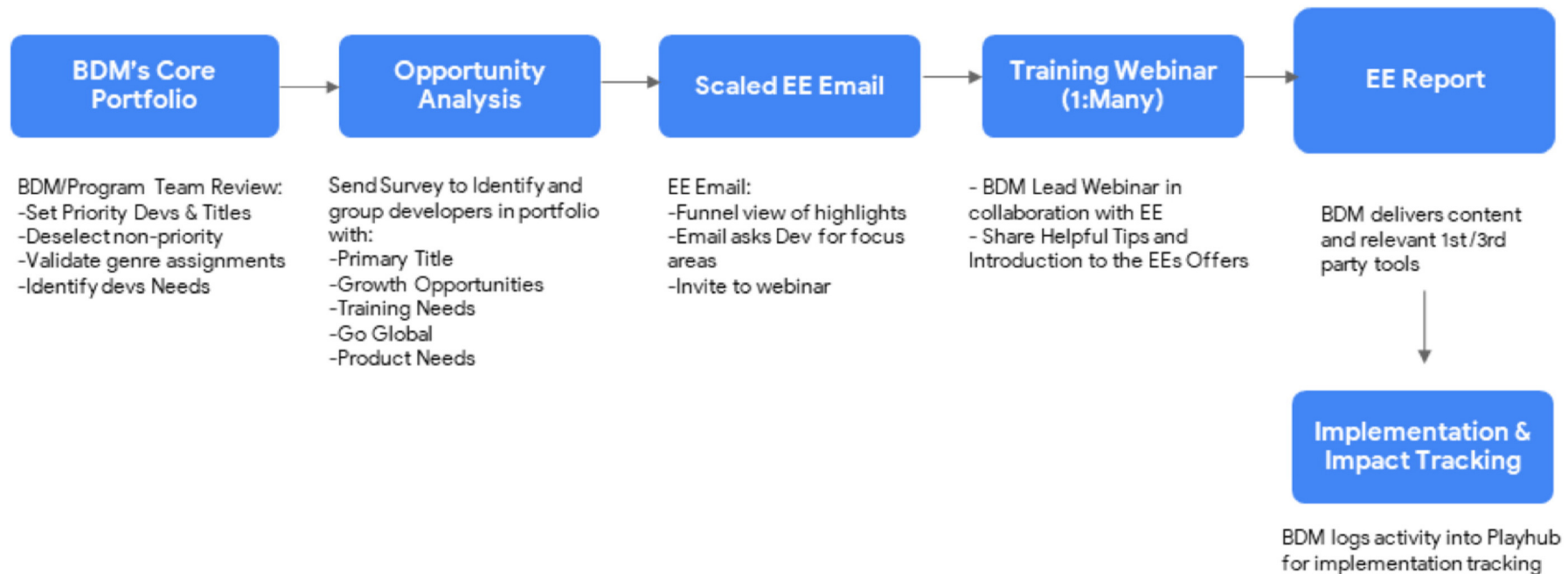
AC PRIVILEGED /// REFLECTS LEGAL ADVICE

[Approach #1] Mapping 1st/3rd P Solutions to Devs' Needs Directly



- As part of our Q1 & early Q2 pilot work we will be focused on testing services & data in execution. With scoping, planning and some execution happening around building out marketing campaigns & custom activities for each developer track meant to increase adoption of recommendations, cross functional perks to drive overall Google partnership value and to help accelerate growth.

[Approach #1- Workflow] Mapping 1st/3rd P Solutions to Devs' Needs Directly



AC PRIVILEGED // REFLECTS LEGAL ADVICE

- Step 1. BDM Portfolio filtering
- BDM sets priority and de-selects certain devs
- Sets priority apps/games across devs
 - If Dev has already been contacted or engaged in activity in past (flagged)
- Validate Genre assignment
- Create Peer set (priority title)
- Step 2. Playhub Prioritization Tool
- Biggest Opportunities by key title
 - Funnel opportunity list view
 - >25% opportunities bubble up
- Monthly refresh of opportunities to BDM portfolios
- Step 3 GC Email
- Funnel View of highlights
- Ask dev on focus areas
- With Webinar sign-up, BDMs mark attendance
 - Devs that attend get the scaled
 - No Shows (repeat) are dropped from Core
- Sent only bi-annual

HIGHLY CONFIDENTIAL - ATTORNEYS' EYES ONLY

GOOG-PLAY-000285848.R

EXHIBIT 8519.R-028

Priority and tracking set

- Step 4 BDM Sends Abridged Report (2 days prior)
- Sent to devs that signed up for webinar
- Common solutions deck

- Step 5 Webinar
- GC content
 - Abridged 301 with example data
- GC team trains BDMs
- BDM decides how to deliver - Hangouts, live stream
 - External Dory
- Step 6 Report
- IAP Games first (Adam H.)
- Abridged Deck
 - 25-30 slides
 - Sample data
 - Playhub template

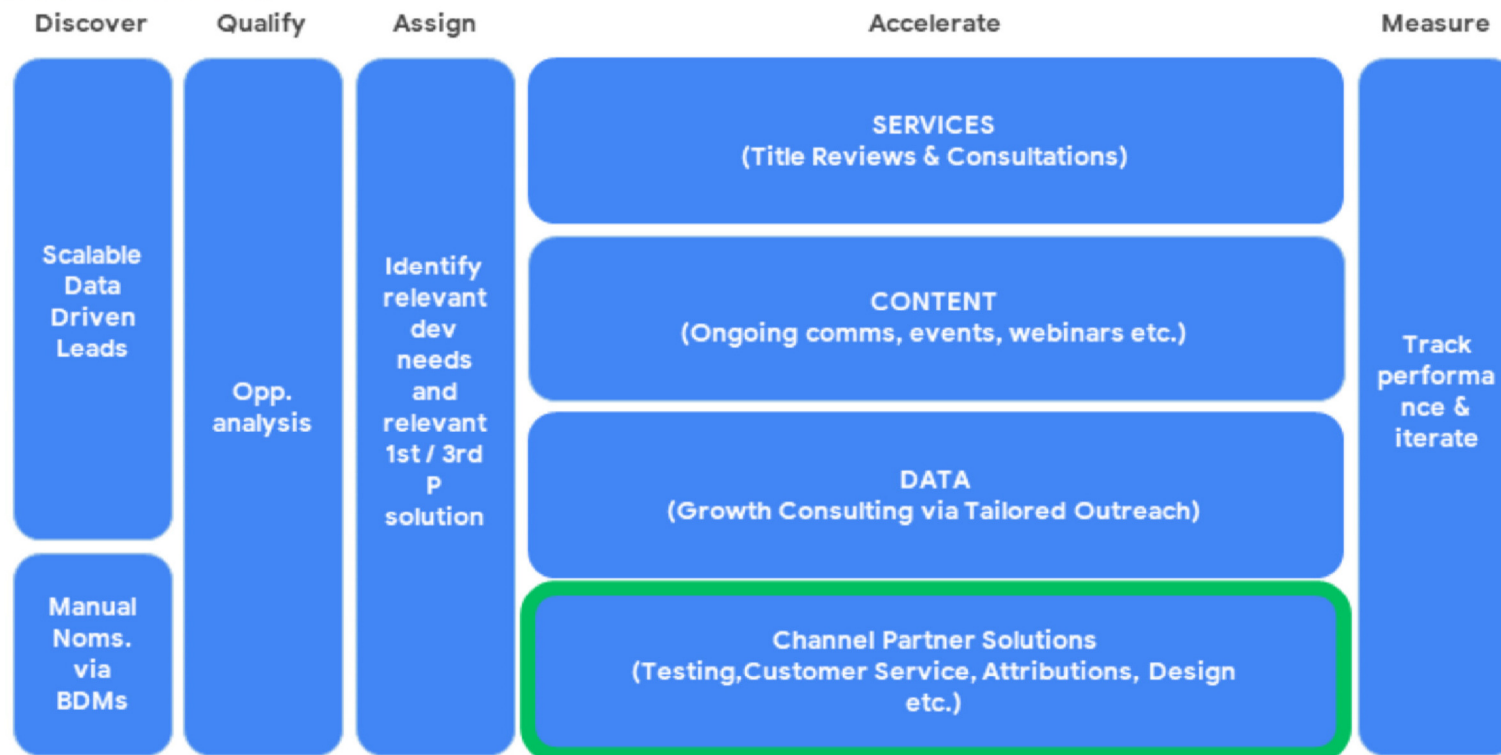
- Implementation & tracking - need to update activity tracker (to capture impact)

- Scaled GC Interaction - BDM Triggered

- TechOps Consultation - UX consultations (tech consulting separate offering)

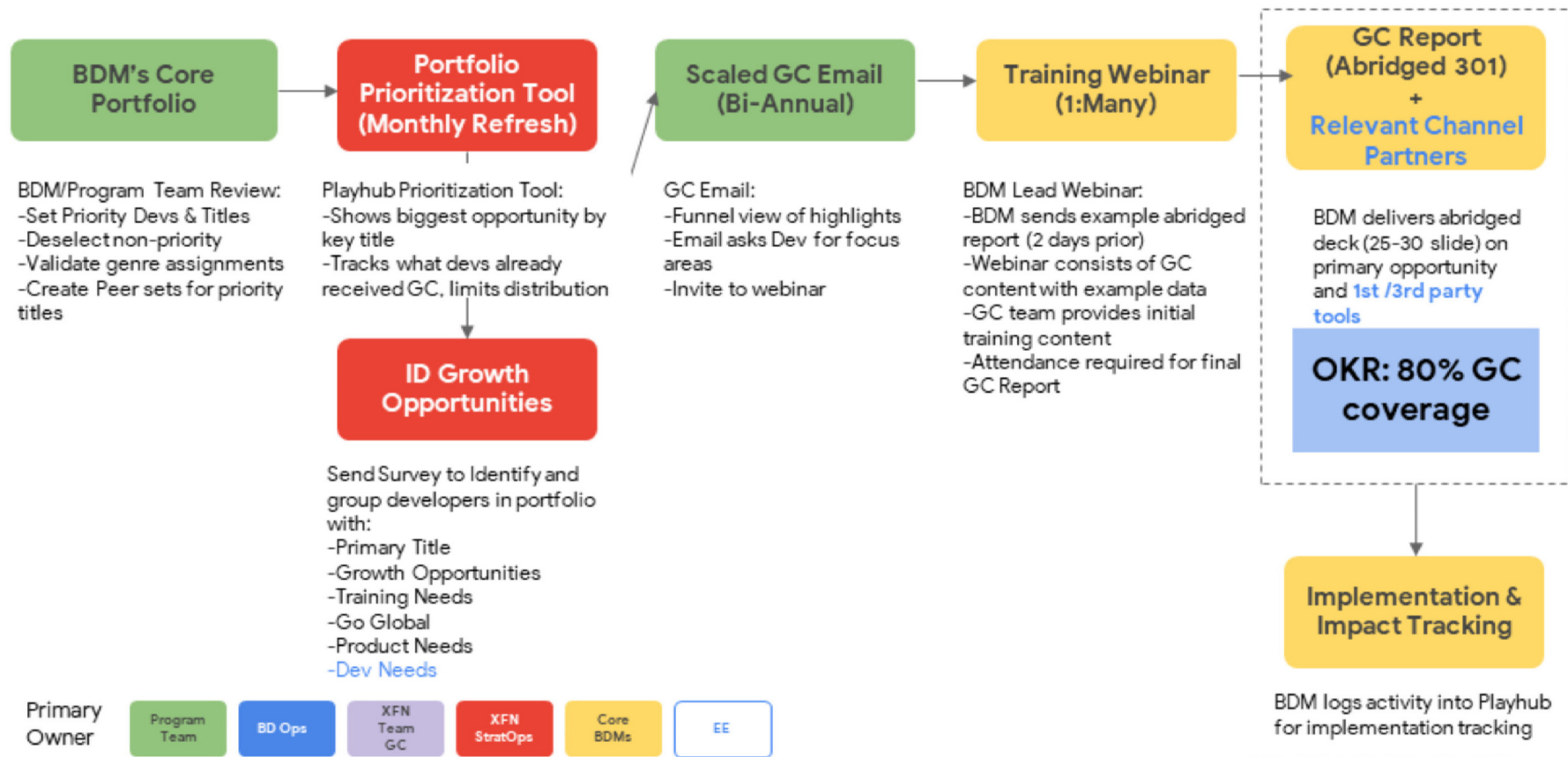
- 3. "Scaled" GC
- (team generates reports, sends out via email and handles follow ups, questions etc.)

[Approach #2] Mapping 1st/3rd P Solutions to Devs' Needs as complementary to GC and GoGlobal



- As part of our Q1 & early Q2 pilot work we will be focused on testing services & data in execution. With scoping, planning and some execution happening around building out marketing campaigns & custom activities for each developer track meant to increase adoption of recommendations, cross functional perks to drive overall Google partnership value and to help accelerate growth.

[Approach #2] GC + Ecosystem Enablement Workflow



AG PRIVILEGED // REFLECTS LEGAL ADVICE

- Step 1. BDM Portfolio filtering
- BDM sets priority and de-selects certain devs
- Sets priority apps/games across devs
 - If Dev has already been contacted or engaged
 - in activity in past (flagged)
- Validate Genre assignment
- Create Peer set (priority title)
- Step 2. Playhub Prioritization Tool
- Biggest Opportunities by key title
 - Funnel opportunity list view
 - >25% opportunities bubble up
- Monthly refresh of opportunities to BDM portfolios

- Step 3 GC Email
- Funnel View of highlights
- Ask dev on focus areas
- With Webinar sign-up, BDMs mark attendance
 - Devs that attend get the scaled
 - No Shows (repeat) are dropped from Core
- Sent only bi-annual

Priority and tracking set

- Step 4 BDM Sends Abridged Report (2 days prior)
- Sent to devs that signed up for webinar
- Common solutions deck

- Step 5 Webinar
- GC content
 - Abridged 301 with example data
- GC team trains BDMs
- BDM decides how to deliver - Hangouts, live stream
 - External Dory
- Step 6 Report
- IAP Games first (Adam H.)
- Abridged Deck
 - 25-30 slides
 - Sample data
 - Playhub template

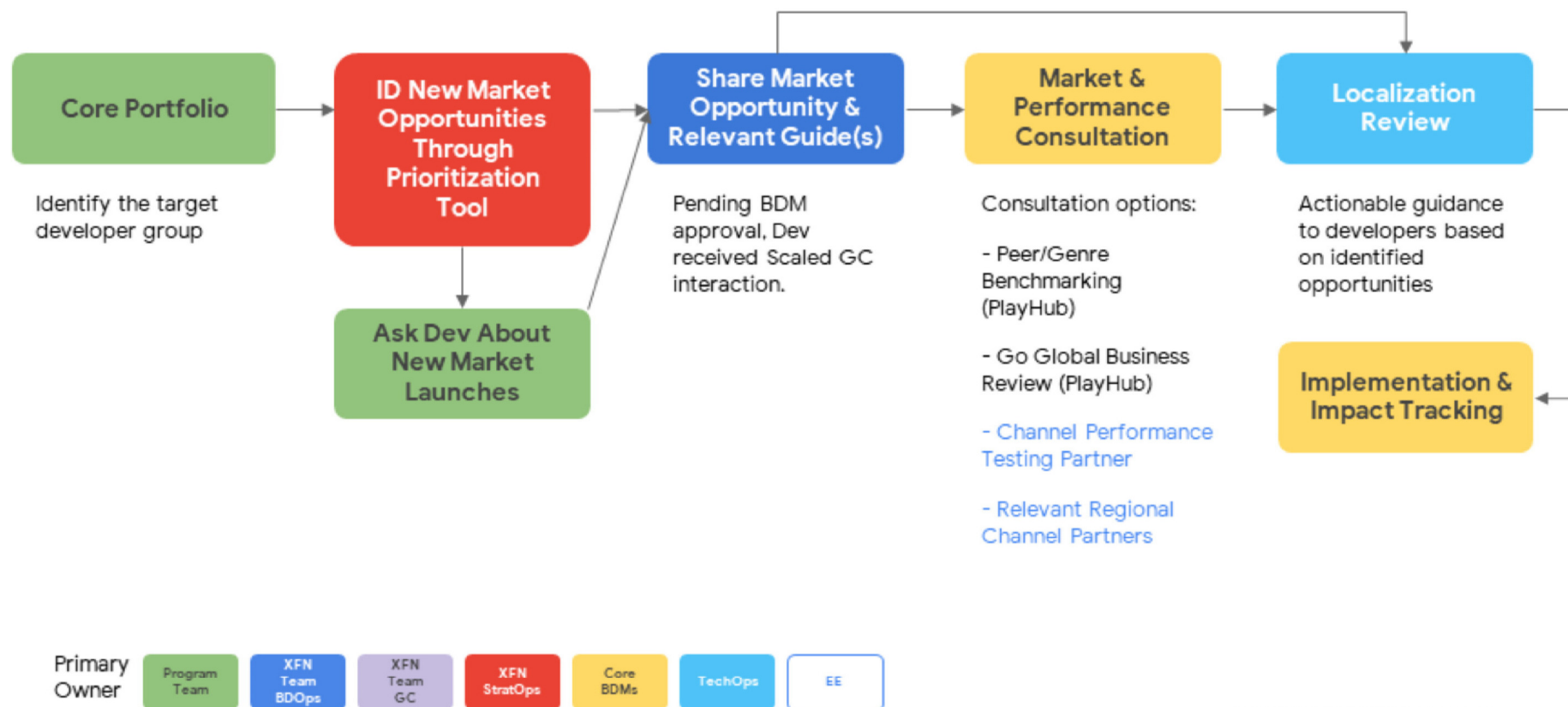
- Implementation & tracking - need to update activity tracker (to capture impact)

- Scaled GC Interaction - BDM Triggered

- TechOps Consultation - UX consultations (tech consulting separate offering)

- 3. "Scaled" GC
- (team generates reports, sends out via email and handles follow ups, questions etc.)

[Approach #2] GoGlobal + Ecosystem Enablement Workflow



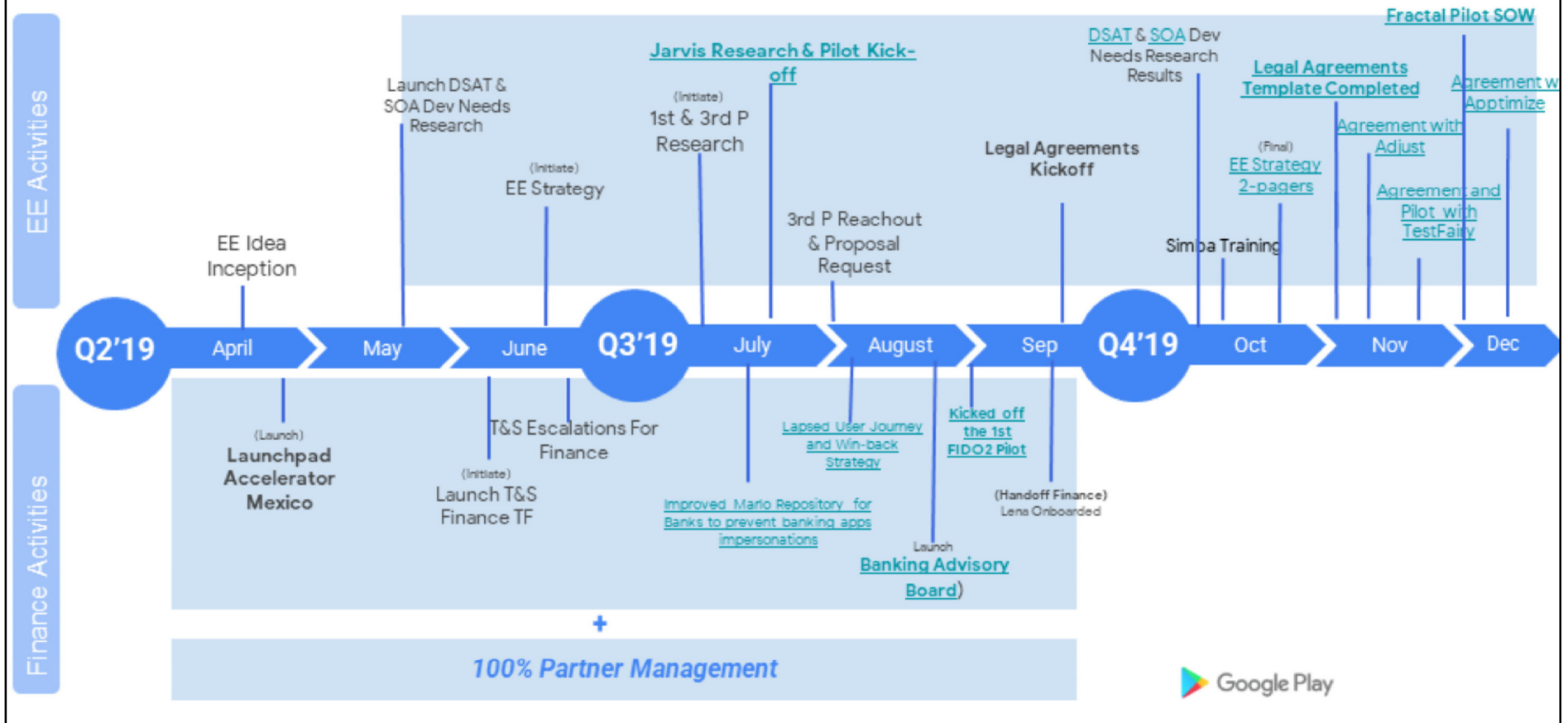
AC PRIVILEGED // REFLECTS LEGAL ADVICE

- Implementation & tracking - need to update activity tracker (to capture impact)
- Scaled GC Interaction - BDM Triggered
- TechOps Consultation - UX consultations (tech consulting separate offering)
- 3. "Scaled" GC
- (team generates reports, sends out via email and handles follow ups, questions etc.)

*So what has been happening since the inception of
the ecosystem enablement idea?*

AC PRIVILEGED /// REFLECTS LEGAL ADVICE

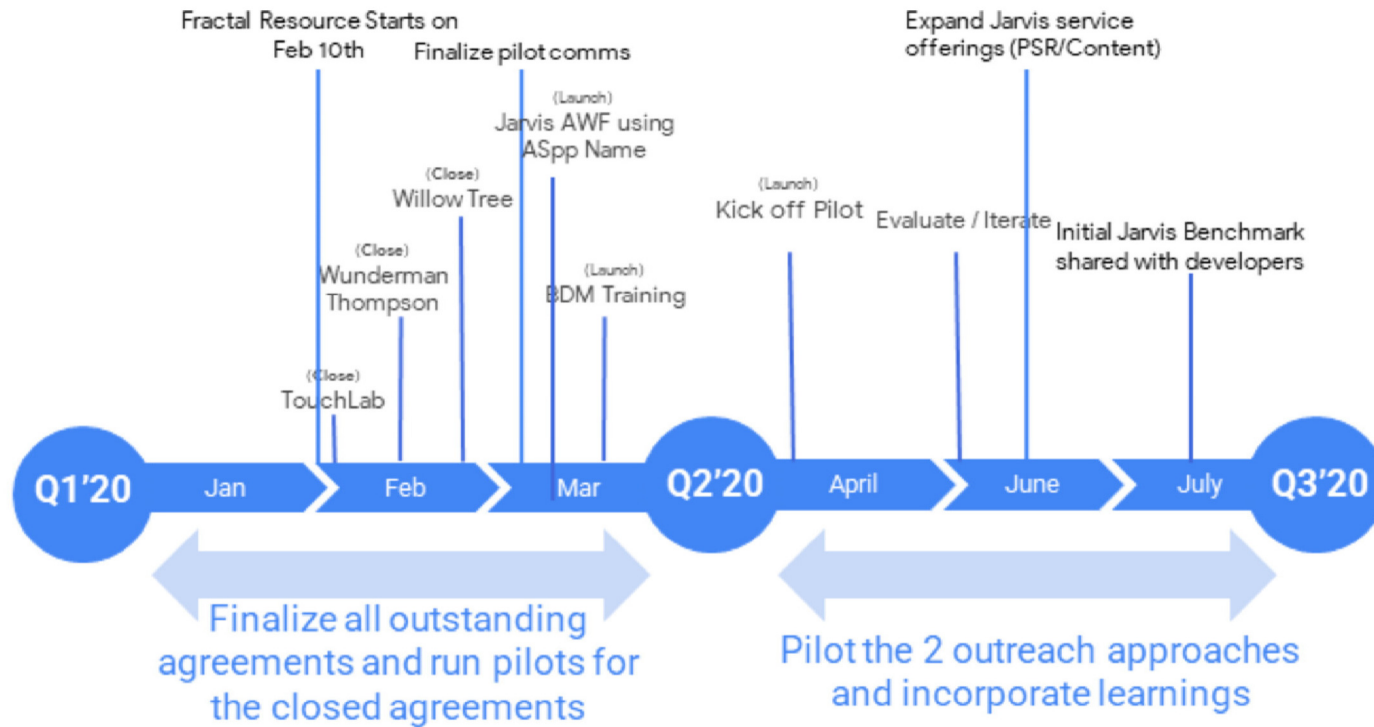
What has been happening since the inception of the ecosystem enablement idea?



What are the next steps

AC PRIVILEGED /// REFLECTS LEGAL ADVICE

What's next?



Next Steps

Q1'20

- Finalize agreements that are in progress to ensure a complete catalog of solutions in each area
- Kick off pilots with the completed catalogs available
- Train BDMs on the value of each 3rd party category and what solutions are good fit for their partners
- Kick Off comms approvals with Legal
- Launch Jarvis App Name

Q2'20

- Kick off pilots and evaluate the previous pilots
- Pilot the 2 workflows and modify as needed
- Close more 3rd party agreements
- Launch Jarvis Benchmark with developers

AC PRIVILEGED // REFLECTS LEGAL ADVICE

Thank You!

AC PRIVILEGED /// REFLECTS LEGAL ADVICE

Control Number : G00G-PLAY-000285821.R

AllCustodians : Kochikar, Purnima

Title : Ecosystem Enablement
Overview and Next Steps

Filename : Ecosystem Enablement
Overview and Next
St_1n30-3lnEiBGAhScFuRvC7AGP
nX02jirWTaenMbKobr0.pptx

DateCreated : 2/6/2020 12:00 AM

TimeCreated : 00:51:00

DateLastModified : 11/17/2020 12:00 AM

TimeLastModified : 06:19:00

RecordType : E-Document

Application :

Author : Ashraf Hassan

Production Vol. : PROD048

Group Identifier :

Subject :

DateSent :

TimeSent :

Email From :

Email To :

Email CC :

Email BCC :